CORPORATE STRATEGY

2017/18 - 2019/20

DESTINATION BRITISH COLUMBIA

March 31, 2017

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BRITISH COLUMBIA

A message from Shirley Bond

Minister of Jobs, Tourism and Skills Training and Minister Responsible for Labour

Destination BC was established by the Province in April 2013 to lead the marketing of British Columbia as a tourist destination, and to promote the development and growth of the tourism industry across BC. In collaboration with community, regional, industry and Aboriginal partners, Destination BC has contributed to strong and diverse growth in the sector, including the record-breaking 5.5 million international visitors that came to BC in 2016. Looking ahead, Destination BC's refreshed Corporate Strategy sets out a strong framework for continued success that builds on the momentum and accomplishments of the last three years.

The Government of British Columbia recognizes tourism as a key economic sector in our BC Jobs Plan. In 2015, tourism supported over 127,700 jobs and contributed $7.4 billion to the Province's GDP. I'm confident that tourism will continue to contribute in the future, creating jobs and increased prosperity for British Columbians in both rural areas and urban centers.

Destination BC's innovative marketing campaigns – including the successful #exploreBC campaign – have revitalized the *Super, Natural British Columbia®* brand and helped promote our province's world-class experiences. This includes supporting the development and marketing of Aboriginal cultural tourism experiences through our partnership with the Aboriginal Tourism Association of BC. Aboriginal tourism is one of the fastest-growing tourism areas in BC experiencing a doubling of revenue from $20 million to $42 million between 2006 and 2012.

Destination BC's work with over 120 communities and regions in BC on their long-term destination development will give these areas an opportunity to market themselves to the world. The refreshed Corporate Strategy builds on these initiatives and will drive even stronger collaboration between Destination BC and its partners to ensure British Columbia remains competitive in the global tourism marketplace The partnerships and collaboration that Destination BC is driving in our tourism sector will also complement the province's recently release Rural Development Strategy. Tourism businesses are found in communities both large and small right across our province. Renewed investments in transportation and infrastructure, improved connectivity and close to home skills training will increase the tourism opportunities already found in our rural communities.

By working together, Destination BC's leadership team have used the strategic marketing advice from its Tourism Marketing Committee as well as the experienced Board of Directors, to provide effective governance for the corporation.

I'm confident that Destination BC will continue its leading edge, collaborative marketing and development efforts to showcase our province to potential visitors around the world and at home. By motivating tourists to experience all that we have to offer, we will continue to grow British Columbia's economy, creating jobs in every region of the province.

Shirley Bond
Minister of Jobs, Tourism and Skills Training and Minister Responsible for Labour

DESTINATION
BRITISH COLUMBIA™

A message from the Chair and CEO

Tourism is one of the world's fastest growing industries, bringing social, cultural and economic benefits to communities around the globe. In fact, the United Nations World Tourism Organization (UNWTO) forecast international travel to double from 900 million international travellers in 2010 to 1.8 billion by 2030. With strong marketing and experience development efforts, as well as the desire to compete effectively, tourism in British Columbia has enormous potential for growth over the next few decades.

Our role at Destination BC is to ensure that British Columbia's tourism industry capitalizes on this immense opportunity and captures an increase in market share. In 2014, our first corporate strategy charted a new course for our organization. Over the last three years, we have seen great success for both BC's tourism industry and Destination BC, validating the new path we chose. Growth in international visitation to BC, which was weak for several years due to the global financial crisis and weak US economy, now out-paces that of our competitors. And Destination BC has achieved significant results as an organization, including increasing our global marketing reach, delivering more referrals to businesses, providing more marketing funds to partners, and introducing new, innovative programs to enhance our destination experiences.

The road ahead continues to be full of opportunity along with new and continuing challenges. In particular, the evolution of the digital world is transforming our role and nearly everything we do. If we want to compete and win in the future, Destination BC and industry must work together ever more closely to harness the power of the digital realm for British Columbia.

To win together we will need to continue to shift how we manage and leverage our assets and relationships. It is through building a powerful marketing network, founded on remarkable experiences, that BC will continue to inspire our visitors and outperform our competitors.

We recognize that deep, collaborative partnerships and high-performing working relationships with a network of traditional and non-traditional partners—all contributing to the power of strategic alignment—enhances the strength of the tourism industry in BC. Building scale by working together.

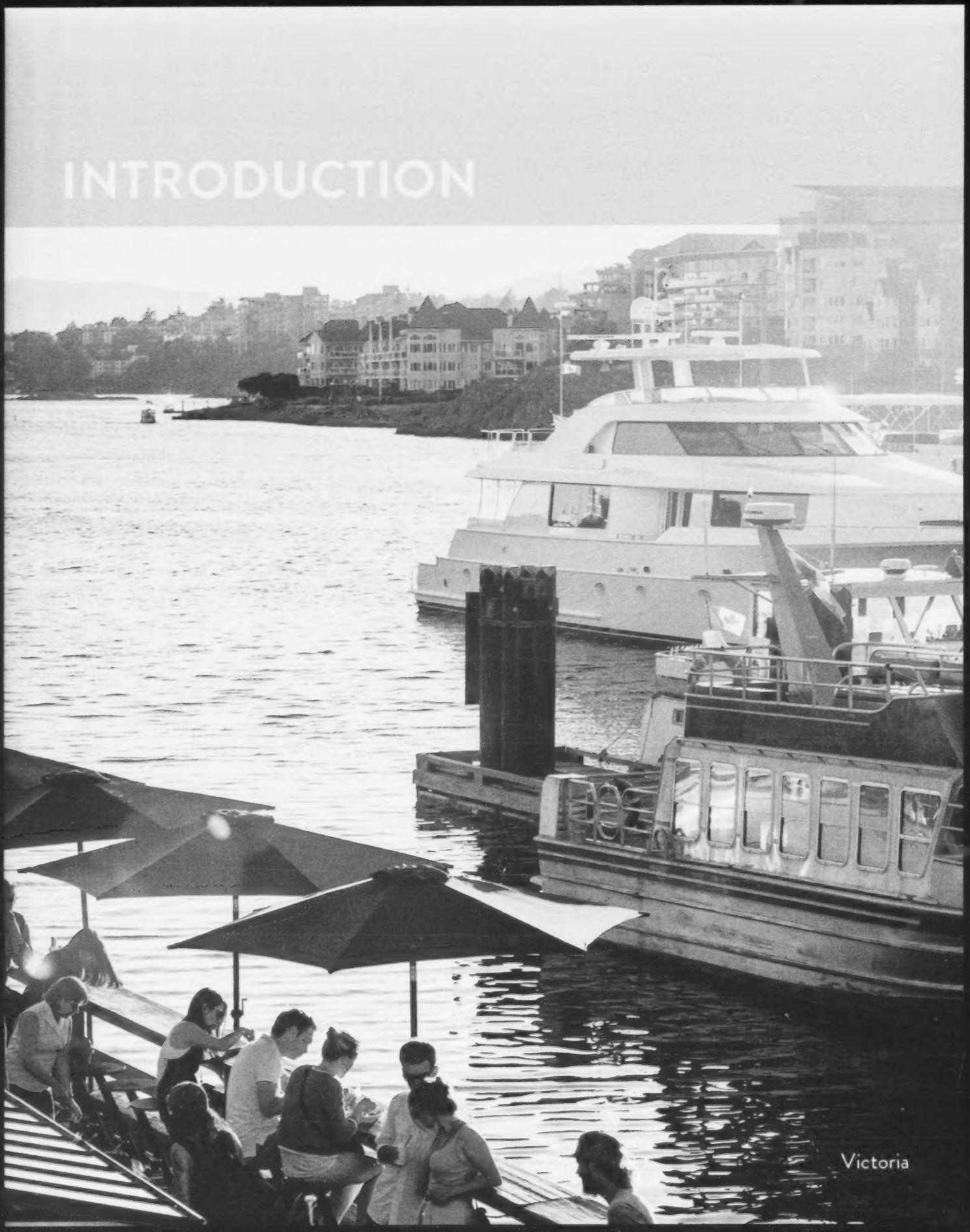
This refreshed plan builds on our first three-year strategy and sets an even stronger path to sharing the transformative power of BC experiences with the world. It also continues our work to help transform our destination for the future and provide significant benefits to our collective industry and for all British Columbians. We must all be exceptional competitors, together.

We look forward to the prosperity of tomorrow.

Marsha Walden, CEO
Destination British Columbia

Andrea Shaw, Board Chair
Destination British Columbia

INTRODUCTION



Victoria

3 INTRODUCTION

In November 2014 Destination BC launched its first three-year corporate strategy in support of the Province's *Canada Starts Here: The BC Jobs Plan*. The BC Jobs Plan identified eight sectors, including tourism, where British Columbia has a strategic competitive advantage. The Province then developed a specific tourism strategy, *Gaining The Edge: 2012 – 2016*[1], which included the creation of Destination BC as a key deliverable.

Destination BC's first corporate strategy included: the revitalization of the *Super, Natural British Columbia*® brand; the introduction of new, innovative, approaches to marketing BC; and the development of new programs to assist businesses to foster remarkable experiences; and sought to drive greater collaboration and alignment at all levels of the tourism industry. In 2014 and 2015, and likely in 2016[2], British Columbia's tourism industry experienced the strongest growth in over a decade, exceeding the target of 5% annual growth of industry revenue initially set in *Gaining The Edge: 2012 – 2016* and reconfirmed in *Gaining The Edge 2015 – 2018*, the updated Provincial tourism strategy.

Destination BC's refreshed strategy for 2017/18-2019/20 builds on the learnings and successes of the past three years and positions us to take advantage of the growth of global travel to create social, cultural and economic benefits tourism provides to all British Columbians. Through deep collaboration with our partners, we will utilize new and evolving technologies that are changing the consumer and marketing landscape to compete and win together.

KEY ACCOMPLISHMENTS 2014 – 2016

Enormous strides have been made in tackling and accomplishing the goals laid out in Destination BC's 2014 corporate strategy. These include:

- Revitalization of the *Super, Natural British Columbia* brand to differentiate British Columbia in the very competitive global marketplace, strengthen BC's brand appeal, increase the urgency to visit of travellers from key markets, and draw industry partners toward greater alignment;
- Transformation of Destination BC's global marketing strategy, leveraging emerging digital tools and platforms, embracing data driven continuous learning and intelligent innovation;

Destination BC works in partnership with Aboriginal Tourism Association of British Columbia to support the development of Aboriginal tourism in British Columbia. *Pulling Together: Corporate Plan 2017-2022 A Five-year Strategy for Aboriginal Cultural Tourism in British Columbia* provides more information on this strategic initiative.

[1] BC's updated tourism strategy, *Gaining The Edge: 2015 – 2018*, was released by Minister Shirley Bond on September 21, 2015.

[2] BC Stats will release data on the economic performance of the British Columbia tourism industry in 2016 during the fall of 2017. Performance indicators already available for 2016 such as international visitor arrivals, hotel occupancy and average daily room rates and Municipal and Regional District Tax receipts point to a very strong year for the industry.

- Deep collaboration and alignment with: traditional partners such as Destination Canada, Travel Alberta; British Columbia's regional, city and community destination marketing organizations; provincial product sector marketing organizations; and, non-traditional tourism partners such as Arc'teryx, Google, Facebook and Expedia, among others;
- Launch of Explore BC, a program to encourage BC residents to travel widely around British Columbia, exploring rural and small town BC, and extending the travel window into shoulder seasons;
- Development and implementation of the unique Remarkable Experiences program, enhancing the experience design and digital marketing skills of participating tourism businesses;
- Introduction of destination development planning across BC, bringing together all levels of government and tourism stakeholders in the co-creation of a destination vision and 10-year destination development plan for each of 18 planning areas covering the entire province;
- Introduction of the new Co-op Marketing Partnerships Program, driving deeper collaboration among BC's communities and sector associations. In 2017/18 over 140 communities are participating in over 50 co-op marketing projects, worth more than eight million dollars, with more than 50% of those funds raised from partners – more than matching Destination BC's annual investment in the program;
- Investment of $3 million over three years in the development and marketing of Aboriginal cultural tourism, one of the fastest growing segments in BC, through the Aboriginal Tourism Association of British Columbia and Destination BC's marketing strategy;
- Encouraging innovation in the provision of community-led visitor services through the execution of a new Visitor Services Strategy and introduction of the Visitor Services Innovation Fund;
- Reorganization of Destination BC's core programs and activities, releasing more than four million dollars a year from lower priority programs to fund high priority marketing programs; and
- Formation and regular meetings of Destination BC's Tourism Marketing Committee, to provide advice to Destination BC's Board of Directors and Management on marketing strategies to reflect industry and community perspectives.

Due to these accomplishments, tourism industry satisfaction with Destination BC's services and programs increased from 6.5 in 2014 to 7.2 out of 10 in 2016.

From 2014 to 2016, tourism received significant support from a broad array of government initiatives designed to foster industry growth, remove travel barriers, and create jobs. For example:

Provincial Government:

- Introduction of the Tourism Events Program to support events motivating Canadians and international visitors to travel to and experience British Columbia as well as broadening and diversifying British Columbia's tourism economy;

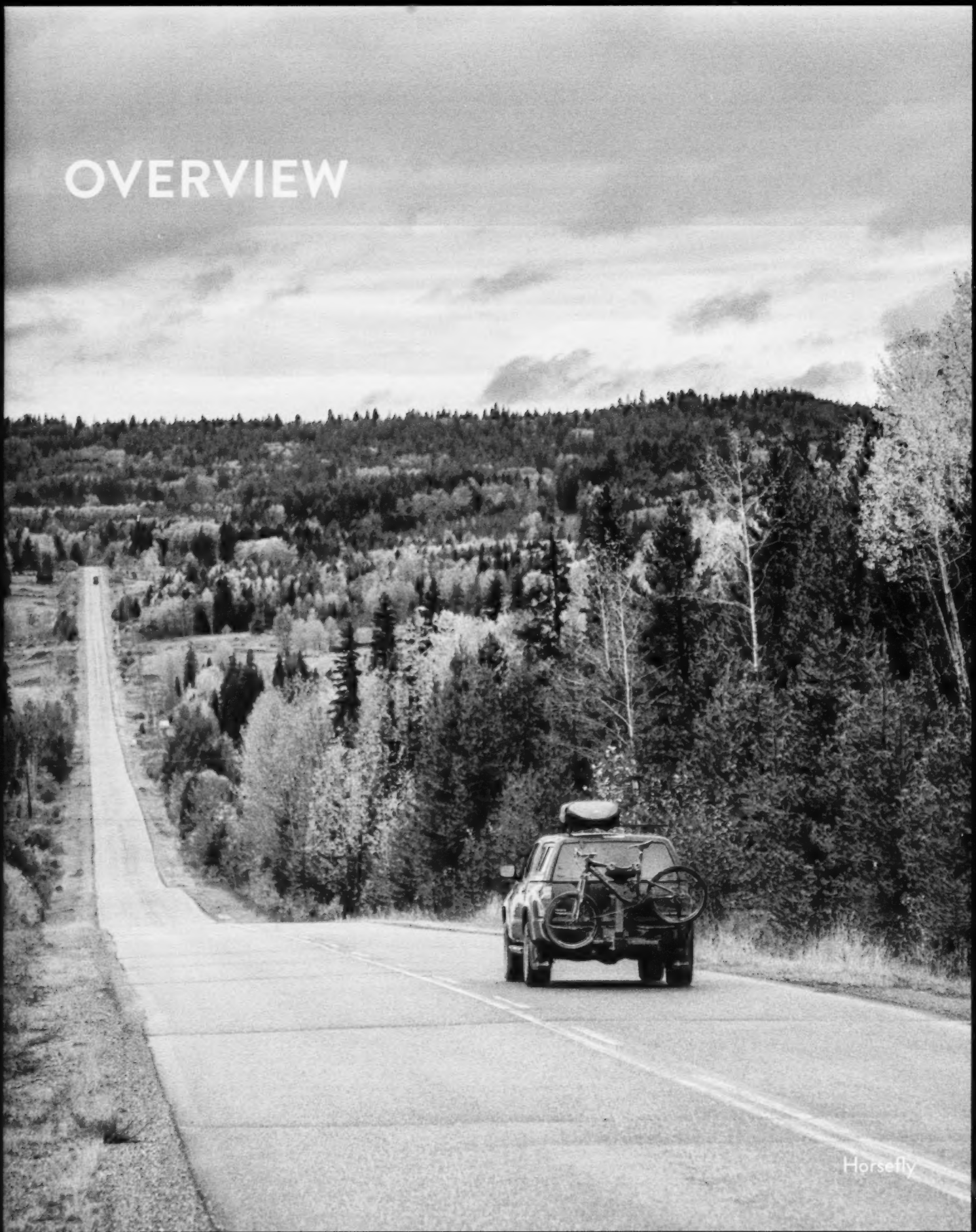
- Enhanced the Municipal and Regional District Tax program including increasing the maximum rate to 3% to boost funding for tourism marketing available to British Columbia's communities;
- Annual investment of $10.5 million in the Resort Municipality Initiative enabling these communities to enhance their appeal to visitors through infrastructure investments, events and other activities;
- Legislated changes to the Tourism Accommodation Assessment Relief Act benefiting rural tourism properties as well as streamlining tenure application and replacement processes for adventure tourism operators;
- Support of $1 million a year since 2008 for the Aboriginal Tourism Association of BC's development and marketing activities;
- Liquor policy reforms making British Columbia's hospitality industry more competitive and leading to unprecedented growth of microbreweries;
- Commitment to the introduction in 2018 of seasonal direct ferry service between Port Hardy and Bella Coola as well as $4.7 billion to be invested in transportation infrastructure over the next three years, $40 million in the extension of rural broadband service which will help tourists and rural tourism businesses and $36 million improving services and supports in BC Parks;
- A funding model for Destination BC providing funding assurance and the opportunity, based on performance, for annual, cumulative budget increases of up to 2%;
- An array of tax reductions, including reducing the small business tax rate from 2.5% to 2.0%, reduction and eventual elimination of PST on electricity and a 50% cut in Medical Services Plan premiums, that will reduce costs and increase profitability of British Columbia's tourism businesses;

Federal Government

- Lifting of Mexico visa requirements, facilitating even more rapid growth in visitation from British Columbia's fastest growing international tourism market;
- Major investments in Destination Canada, providing $50 million of incremental funding over two years;
- Investment of $10 million per year for three years in Destination Canada's Connecting America marketing program;
- Investment of $3 billion over five years in Parks Canada to support infrastructure improvements across Canada's network of national parks, historic sites and marine conservation areas.

Further details about these and other accomplishments can be found in Destination BC's Annual Service Plan Reports, Destination BC's monthly newsletter and annual reports by the Ministry of Jobs, Tourism and Skills Training on the progress of the provincial tourism strategy, *Gaining The Edge*.

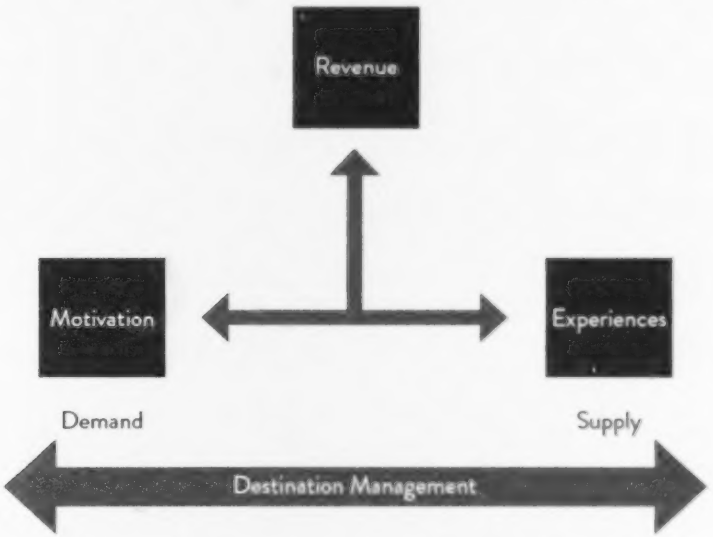
OVERVIEW



4 OVERVIEW OF OUR CORPORATE STRATEGY

4.1 OUR CORPORATE STRATEGY FRAMEWORK

When developing our first corporate strategy, as well as this refreshed strategy, we used a demand and supply framework to categorize short-, medium- and long-term drivers of the performance of British Columbia's tourism economy.



Marketing is one of the two key drivers of tourism revenue, and includes the efforts of Destination BC, BC's tourism businesses and organizations that market our province to the world, as well as Destination Canada. To strengthen the demand driver, we need to optimize our own marketing and enable our partners to have greater impact by creating a powerful marketing network for British Columbia.

On the supply side, tourism industry performance is driven by the experience visitors actually have on the ground, at tourism businesses and attractions, and with the infrastructure of the destinations they visit. What they say about these experiences to their friends and family, and through social channels to their networks, is also a critical driver. In the longer term, destinations within British Columbia, and their infrastructure, need to evolve in a way to optimize the benefits of tourism for BC's residents.

However, no organization is able to do everything. To make the best use of our resources, we must make good choices that provide clarity and focus, and bring the biggest return on investment to our organization and our industry. In 2014, we adopted the "Playing to Win"[3] framework to guide the development of our first corporate strategy. This framework continues with our refreshed corporate strategy for 2017/18-2019/20. Using this framework, our corporate strategy answers five questions:

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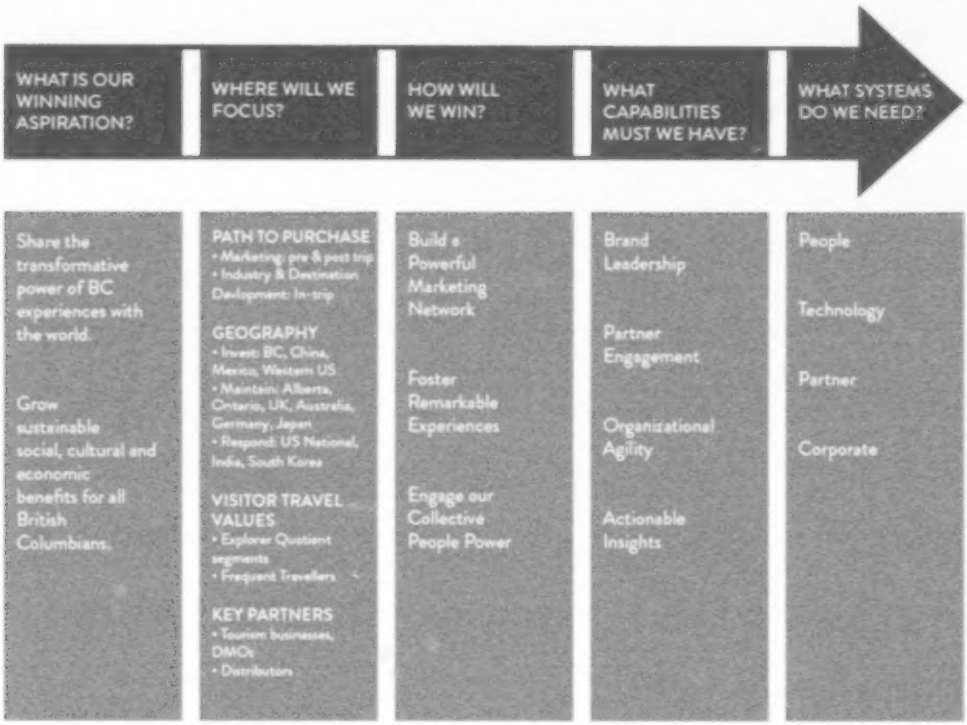
[3] For more information on the strategic framework used to create our strategy, see *Playing to Win* by Roger Martin and AJ Laffley.

- What is our winning aspiration?
- Where will we focus?
- How will we win?
- What capabilities must we have?
- What systems do we need?

As you read through our refreshed strategy, each of these five questions will be answered. While much remains the same, some aspects have evolved to reflect progress that Destination BC has made to date and changes in our operating environment, primarily due to the impact of technology on consumer behavior and the new opportunities that this presents for the BC tourism industry.

4.2 OUR CORPORATE STRATEGY AT A GLANCE

Our refreshed strategy is summarized in the "strategy at a glance" graphic below, which provides an overview of the key elements of the plan. You will see these elements described in more detail in the remainder of this document.


WHAT IS OUR WINNING ASPIRATION?
WHERE WILL WE FOCUS?
HOW WILL WE WIN?
WHAT CAPABILITIES MUST WE HAVE?
WHAT SYSTEMS DO WE NEED?
Share the transformative power of BC experiences with the world.
Grow sustainable social, cultural and economic benefits for all British Columbians.
PATH TO PURCHASE
• Marketing: pre & post trip
• Industry & Destination Development: In-trip
GEOGRAPHY
• Invest: BC, China, Mexico, Western US
• Maintain: Alberta, Ontario, UK, Australia, Germany, Japan
• Respond: US National, India, South Korea
VISITOR TRAVEL VALUES
• Explorer Quotient segments
• Frequent Travellers
KEY PARTNERS
• Tourism businesses, DMOs
• Distributors
Build a Powerful Marketing Network
Foster Remarkable Experiences
Engage our Collective People Power
Brand Leadership
Partner Engagement
Organizational Agility
Actionable Insights
People
Technology
Partner
Corporate

This refreshed strategy is supported by annual global marketing plans and destination and industry development plans. These complementary plans include more specific information on Destination BC programs that support our corporate strategy.

4.3 OUR CORPORATE GOALS

Our refreshed corporate strategy has four strategic goals:

VISITORS	Become the most highly recommended destination in North America.
REVENUE	Lead Canada in growth of overnight visitor expenditures.
INDUSTRY	Enable a collaborative, digitally-savvy, insight-driven tourism network.
PEOPLE	Lead by being a collaborative, insight-driven, results-focussed team.

To achieve British Columbia's potential and win in the fiercely competitive battleground that is global tourism, BC's tourism industry will need to be more digitally-savvy and insights-driven. It will also need to better collaborate to develop and engage the capabilities and scale that are needed to compete effectively. We believe Destination BC has a significant role to play to enable this, hence an industry goal is a critical strategic addition to our 2017/18-2019/20 corporate strategy.

The goals of our corporate strategy are supported by the goals of our marketing, and destination and industry development plans:

MARKETING GOALS

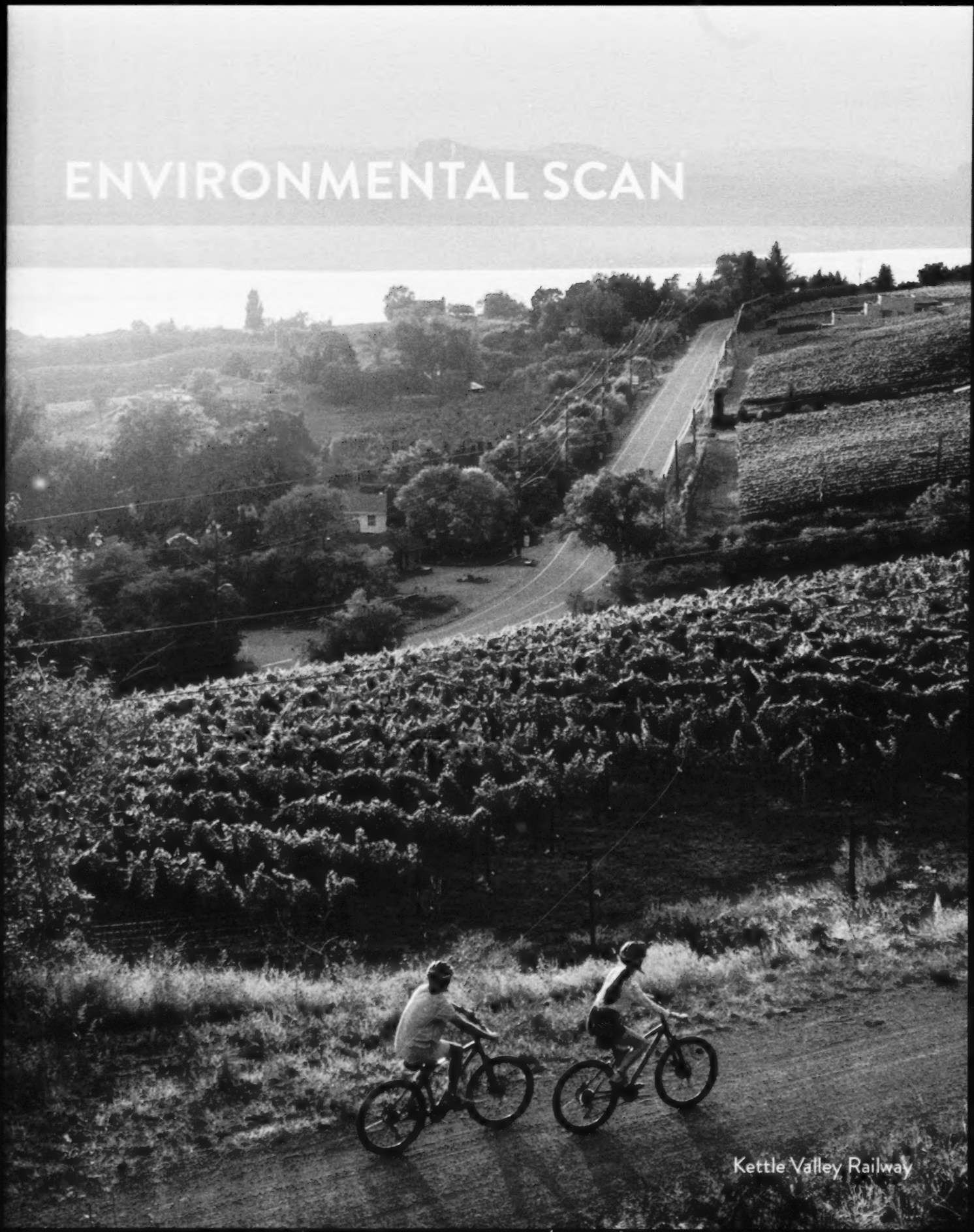
1. Achieve annual increases in visitor expenditures from our top 10 markets.
2. Amplify and strengthen BC's worldwide reputation.
3. Strengthen BC's brand health and resonance.
4. Increase brand engagement and traveller advocacy.

DESTINATION & INDUSTRY DEVELOPMENT GOALS

1. Increase BC's long-term demand and competitiveness as a destination.
2. Improve the guest experience and strengthen BC's worldwide reputation.
3. Drive stronger collaboration with communities, sectors, regional DMOs, businesses, stakeholders, and all levels of government (municipal, regional districts, First Nations, provincial and federal).
4. Increase benefits of tourism throughout BC.

Net Promoter Score: Destination BC uses Net Promoter Score to measure the Visitors Goal "Become the most highly recommended destination in North America", and encourages tourism businesses and destinations with BC to adopt this as a best practice as well. More information on Net Promoter Score is available on our corporate website.

ENVIRONMENTAL SCAN



Kettle Valley Railway

5 ENVIRONMENTAL SCAN

5.1 INDUSTRY CONTEXT

Tourism has become one of the largest and fastest growing economic sectors in the world. It is expected to continue to grow over the next 10 to 15 years due to the rapidly growing middle class in emerging economies such as China, steady economic growth in developed countries as they rebound from the 2008 global economic crisis, and an increasing sense that travel is a part of life among residents of wealthy countries.

According to the UNWTO, international tourist receipts grew by 4.4% worldwide in 2015 to an estimated $1,260 billion USD spent by about 1.186 billion travellers worldwide. Approximately 52 million more people travelled in 2015 than 2014, the sixth consecutive year of strong growth following the 2008-09 global economic crisis.

Industry Performance: Destination BC publishes multiple reports to track visitor volume and industry performance, including Tourism Indicators and the Value of Tourism. Access the latest information on our corporate website.

Forecasts call for continued growth – the number of international travellers is projected to reach 1.8 billion by 2030.[4] With a 10-year positive outlook for international tourism arrivals, the UNWTO's forecast is for tourism to continue to be a strong, healthy industry globally over the next decade and beyond.

After more than a decade of steadily losing market share, as the global tourism industry has expanded with new choices and greater travel volumes from emerging source countries, tourism in British Columbia has been on the rise since 2014. During 2015 and 2016 international arrivals to BC increased 7.9% and 12.3% respectively, well above the global growth rate during the same period.[5]

Destination BC and British Columbia's tourism industry have made great strides over the last three years. The Provincial government has introduced many policy changes and new programs, such as the enhanced Municipal and Regional District Tax and Tourism Events Program, to enhance growth of the tourism industry. However, larger market forces are looming that make it critical for us to build on our achievements so far. A refreshed strategy is needed to help achieve our goals and ensure we continue to capitalize on the world's appetite for travel.

The first step in refreshing our strategy was a comprehensive review of our operating landscape – an environmental scan. We identified many trends and drivers that have shaped our refreshed corporate strategy. Five key forces are outlined below; the complete environmental scan is available on request.[6]

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[4] Source: UNWTO, Tourism Highlights, 2015

[5] Destination Canada Tourism Snapshot, December 2015

[6] To obtain a copy of the complete Environmental Scan please send us an email at ContactTourism@DestinationBC.ca.

5.2 KEY FORCES

1. Consumer Values

Experiences being offered in British Columbia, combined with the awareness and motivation of potential visitors, are still the key drivers of tourism growth. BC has a spectacular diversity of tourism experiences that generate a very high Net Promoter Score among visitors. This is a huge strength for the province, one that is supported by innovative marketing by Destination BC and other organizations. However, while there is great diversity of product, not all operators have the level of market readiness needed to maximize their potential, nor the marketing capacity to captivate new visitors and drive repeat visitation.

> **Implication**: Stronger brand alignment is needed to act as an umbrella for the diverse product offerings, as well as innovative, inspiring marketing to motivate visitation. Destination BC needs to continue to have a strong understanding of each geographic market to promote the right products in the right markets to the right consumers. Efforts are also needed to foster remarkable experiences and improve market readiness.

2. Technology Impacts

There has been a monumental increase in the pace in which new technologies dramatically change our consumer and marketing landscape, yet for an industry made up of approximately 19,000 predominantly small- and medium-sized businesses, it can be daunting for a single business or community to harness the power of technology to compete on a global scale. There are great opportunities to utilize the power of data management and marketing platforms, machine learning and artificial intelligence (AI), the internet of things, referral networks, and other transformative technology to help BC's tourism industry be a more formidable competitor.

> **Implication**: Destination BC, and BC's tourism industry, must have access to transformative technologies and platforms, and leading expertise to compete globally and work with partners to invest in scalable and shareable technology, platforms, capabilities and information to enable BC's tourism industry to compete and win.

3. Growing Competition

Competition is an ongoing threat to the choice of British Columbia as a destination. Emerging destinations such as Cuba, Myanmar, Oman, Iceland and others add to the growing list of countries around the world that are diversifying and strengthening their economies through tourism, drawing visitors away from traditional European and North American destinations. Other factors, such as the weakening Australian and New Zealand dollars, can also entice travellers from BC's key markets to consider those and other destinations as their value becomes more appealing.

> **Implication**: BC's destination brand must solidify our value proposition and promote compelling reasons to visit BC now, by effectively differentiating our experience from other locations. We must strategically choose our geographic markets and target our highest potential consumer segments (through psychographics, behaviour,

passions, etc.). Destination BC must remain in close consultation with communities and industry to enable the development of strategic destination development plans that are robust yet flexible enough to adapt to a potentially quickly changing environment.

4. Structuring to Win

BC's tourism sector is built on a foundation of established industry networks. These networks can create greater strategic alignment, create access to more marketing funds for all parts of industry, enhance the visitor experience, and reduce administration costs and duplication, among other benefits. These networks allow industry to overcome the limited access to resources and expertise of the predominantly small businesses that make up BC's tourism industry. In 2014, 91.8% of these businesses had fewer than 50 employees, while 74.4% had less than 20.

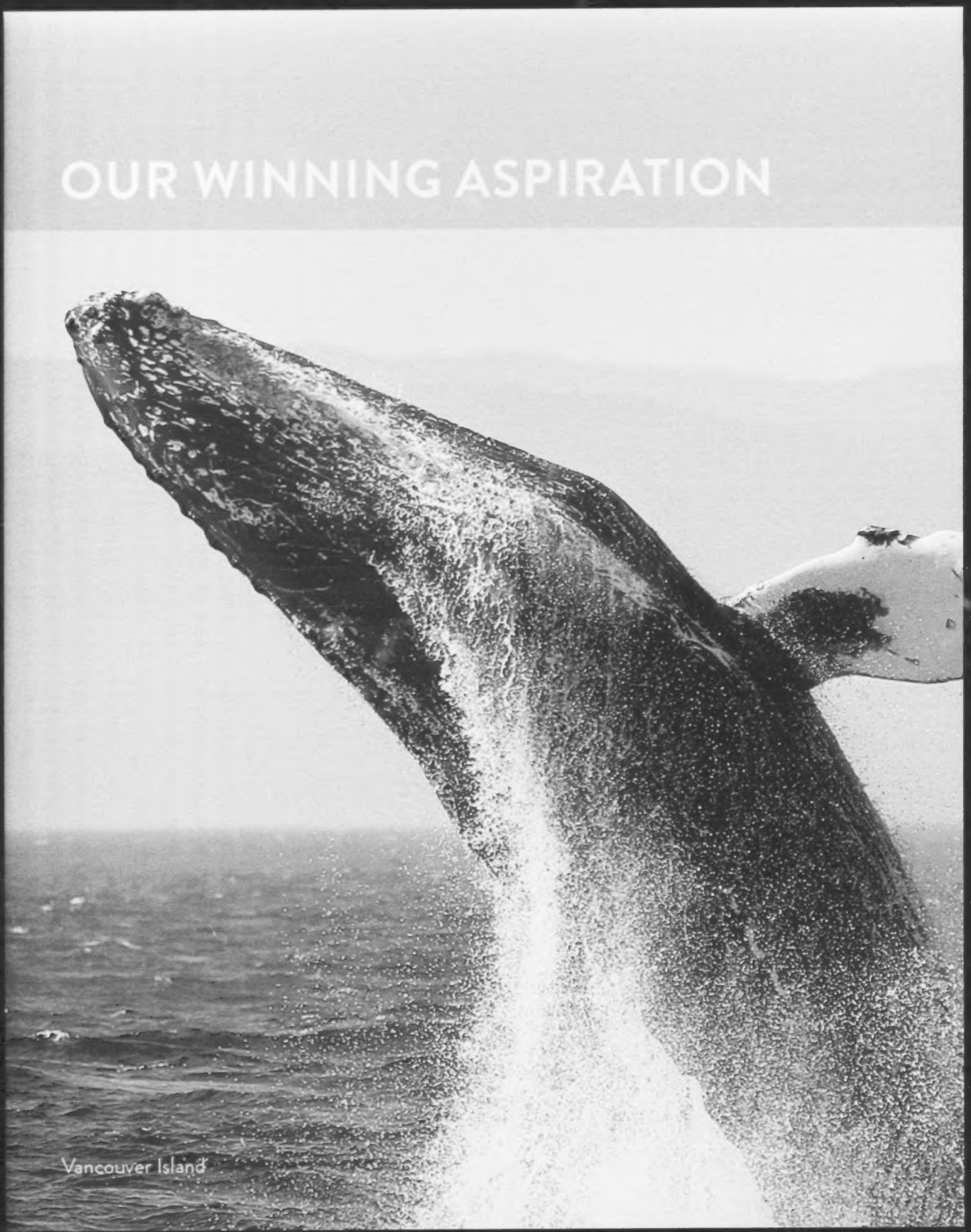
Implication: Strengthening, leveraging and expanding these networks will enable success in an increasingly competitive world. Networks can be used to share resources and knowledge, and access sophisticated marketing technologies and platforms that are unaffordable for most communities and individual businesses. Networks can act as catalysts for innovation, product enhancement, or marketing partnerships, and amplify a uniform destination brand position and message.

5. Investing in Tourism for the Long Term

There is growing recognition of tourism as a key economic driver in British Columbia. Tourism has experienced rapid growth and is the top contributor to British Columbia GDP among primary resource industry sectors. A recent survey of BC businesses, conducted by the BC Chamber of Commerce, found that almost 90% of respondents felt British Columbia's visitor economy will become even more important over the next decade. Strong year-round growth and increased awareness of tourism provide opportunities for Destination BC and the tourism industry.

Implication: Increased recognition of the importance of tourism by other sectors and by government at all levels can be leveraged to increase stakeholder participation in tourism planning. This helps to create and implement long-term destination development plans that maximize the tourism opportunity and increase consideration of tourism impacts of local government policies, regulations and infrastructure investment. Fully capitalizing on the benefits of tourism, which are often concentrated in peak seasons, requires a strong focus on growing the shoulder seasons through both destination development activities and marketing strategies. Destination BC can play a leading role in supporting tourism planning, and assisting stakeholders to determine product and experience opportunities and marketing strategies that leverage existing infrastructure and drive shoulder season growth.

OUR WINNING ASPIRATION



Vancouver Island

6 OUR WINNING ASPIRATION

A winning aspiration is a future-oriented statement that is the guiding purpose of the organization. It answers the questions:

- What does our organization exist to do?
- What does winning mean for us?

Our winning aspiration motivates us to do what it takes to give BC a competitive edge, driving all our strategic decisions. Visitors have told us that the defining draw of BC is the transformative power of its vast wilderness—the change in their inner selves that can result from time spent experiencing British Columbia's awe-inspiring nature and its cities on the edge of wilderness.

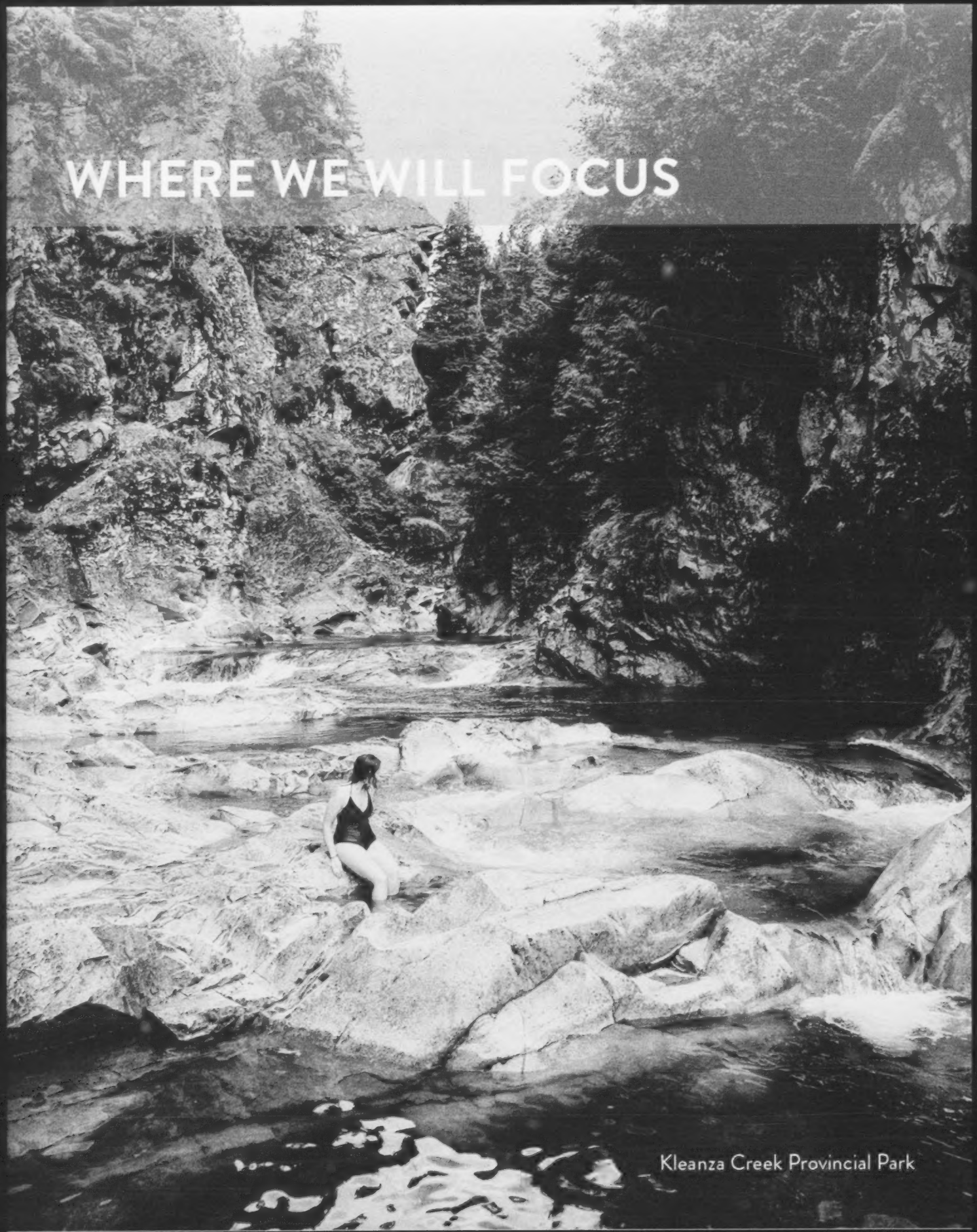
By sharing the transformative power of British Columbia's tourism experiences with the world we will grow sustainable social, cultural and economic benefits for all British Columbians.

OUR WINNING ASPIRATION

Share the transformative power of BC experiences with the world.

Grow sustainable social, cultural and economic benefits for all British Columbians.

WHERE WE WILL FOCUS



Kleanza Creek Provincial Park

7 WHERE WE WILL FOCUS

One of the most important decisions we must make in our corporate strategy is where we will focus our energies and resources. We can't do everything; therefore we need to focus on strategies that can make the biggest difference for BC's tourism industry. We have determined four areas of focus where we are making strategic choices:

- Path to Purchase
- Geographic Markets
- Visitor Travel Values
- Key Partners

7.1 PATH TO PURCHASE

Defining our role in the consumer's path to purchase for leisure travellers focuses our marketing efforts on the stages where we can have the biggest impact on our customers' decisions. Collectively, we and all BC tourism industry stakeholders have a role in capturing the imagination and interest of prospective visitors through marketing and experience development tactics that target the key stages of the path to purchase.

More and more across the globe, consumer travel planning and purchasing has become self-powered, enabled by the availability and adoption of technology. The consumer's path to purchase is no longer linear and has become subject to frequent disruption, as consumers are bombarded by new messages, ideas and destination possibilities. As a result, travel inspiration, planning and booking has become frenetic and chaotic, rather than a predictable, step-by-step process.

The shift to mobile technology has had a huge impact on the path to purchase, and therefore on the strategies and tactics used by marketers. Studies have shown people check their devices 150 times per day. Each interaction creates an opportunity that marketers can respond to in a way that was not possible a few years ago.[7]

Each time travellers watch a video, visit a website or check up on their friends through Facebook, they are demonstrating interest in a subject, such as a vacation destination, recreational pursuit or a hobby. These indictors of consumer interests are "signals of intent" that marketers can respond to – if they have the capability to do so.

With the ubiquity of mobile devices, travel planning now takes place during "micro-moments"[8] – the moments people have every day, perhaps in a lineup for a coffee or on the bus, which they fill by checking their device. On average, a consumer engages in 143 micro-moments over 43 days of travel planning[9], rather than a few long sessions

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[7] Google

[8] Facebook IQ, *Moments that Matter*

[9] Facebook

as in the recent past. Consumers are planning across channels, moving from mobile to desktop and back, in short bursts, which give marketers like Destination BC more opportunities to reach people, but less time to grab attention.

Due to this disruption in the path to purchase, we are focusing our marketing efforts at specific points on the path to purchase where we can have the biggest impact—our role is inspiring interest in a trip to British Columbia and creating a better hand-off to those who can help the potential visitors with trip planning and closing a sale. In the path to purchase, we see our marketing role primarily in the pre-trip "dream" and post-trip advocacy "share" stages, with a supporting role in trip planning, booking and in-destination activities that are executed by others. We also see an important role in assisting tourism businesses to become more digitally-savvy and effective marketers.

As we look at the shifts in channel choice by travellers, it is increasingly a self-service world supported by digital tools. However, some markets are shifting faster than others. In many long-haul markets, the traditional travel trade (tour operators, travel agents and receptive tour operators) play a key role in the purchase cycle versus direct booking with airlines or hotels. The largest travel agents in the world are Expedia and Priceline, followed by smaller online travel agencies (OTAs) and traditional travel trade counterparts such as Carlson Wagonlit and JTB.

On the in-destination side of the path to purchase, our role is to support communities to provide remarkable visitor services and assist the development of memorable experiences.

In summary, we are:

- Focusing our marketing efforts on "pre-trip" for inspiration and handoff to tourism entities that can help with advancing the planning and closing the sale, and "post-trip" for advocacy.
- Focusing our development efforts on "in-trip" experiences and visitor service excellence.
- Developing an approach to support consumers in their travel planning process via an industry-wide data and digital ecosystem. Shared measurements and attribution systems will help us truly understand what creates success along the path to purchase, from inspiration through to planning, booking, visitation, and advocacy.
- Recalibrating our relationship with traditional travel trade globally, recognizing that while it's a core channel for high-yield visitation, we need to play a stronger role with the large volume organizations who arrange travel, such as OTAs, Google, etc.

7.2 OUR GEOGRAPHIC MARKETS

When identifying the best growth opportunities for BC, we looked at both our traditional markets and new, emerging markets. For each market, we looked at the current volume, as well as short- and long-term growth potential, and other factors and considerations.

Our market priorities were identified through a careful data-driven process. We started by reviewing the current size of each market (as measured by visitor expenditure in BC), analyzing the trip purpose by market and looking at our ability to influence the visitor volume and spend in leisure and visiting friends or relatives (VFR) markets. We then

estimated both the short- and long-term potential of these markets, taking into consideration factors such as economic health, exchange rates, demographic trends, access, market share, barriers to growth, average per trip expenditure, lifetime value, seasonality, regional dispersion once in BC and the marketing role of Destination BC relative to other partnerships and collaborative relationships.

We are:

- **Investing for Growth** in Western USA (Washington, California, Oregon), China, Mexico and British Columbia[10]. These are growing, medium-to-large markets for BC, with strong growth potential.
- **Maintaining our Strength** in UK, Germany, Australia, Japan, Ontario (ski only), and Alberta. These are mature, medium-to-large markets.
- **Responding** to opportunities in the USA national market, South Korea, India and France. These are markets with strong growth potential that are candidates for "Invest for Growth" in the future.

We will review and update our targets for our top markets annually, adjusting them to reflect overall industry growth targets, and economic and market conditions.

Air access plays a critical role in growing overseas markets. Elimination of the provincial aviation fuel tax and the liberalization of bilateral air transport agreements and visa policies have led to substantial increases in air access to British Columbia, including new direct flights from Europe, Asia, Australia and Mexico over the past two years.

More About: Our Role in Overseas Markets

In our core overseas markets, we maximize investment by aligning ourselves with Destination Canada's consumer-direct efforts and supporting a strong Team Canada message. A strong Canada brand in turn supports a strong BC brand. In parallel, we have strong relationships with the traditional travel trade and OTAs via a key account strategy, and initiate or support innovative, relevant travel media and social media opportunities.

In North American markets we see considerable overlap with many stakeholders (Destination Canada, other Provincial Destination Marketing Organizations (PDMOs), our regional partners, cities, communities and tourism businesses) all advertising in the same geographic markets. Our collective industry goal is to align our efforts to avoid duplication. Therefore, our approach is to lead in markets that are farther away, or more costly for industry to reach, and to support the efforts of others in closer-in markets by providing programs that leverage industry investment. These programs include our regional partnerships and the Co-op Marketing Partnerships Program introduced in 2016/17.

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[10] 60% of travel within or to BC is by BC residents. The strengthening of the US dollar in 2014/15 created an opportunity to shift travel by British Columbians from the US to within the province and, since 2016, we have been investing funds to encourage BC residents to travel to new places within the province. We will periodically review whether BC should remain an "Invest" market or moved to a "Maintain" market.

More About: The BC and Canada Brands

Supporting a Strong Canada

The further a market is located from BC, the less known the name "British Columbia" becomes, and the more significant the "Canada" brand becomes.

In many overseas markets, there is low consumer awareness of individual provinces. The consumer's first decision may relate to a choice to travel to North America vs. Australia, followed by a choice between Canada and the USA, west coast or east coast. Then, as consumers begin to visualize their travels, they will most often choose a city experience as the first stop in their travels (a choice that is significantly driven by air routes).

Therefore, in markets that are geographically close to us or have significant familiarity, we will lead with the British Columbia brand, and use the Canada brand as an endorsement. In overseas markets, we will reverse the hierarchy: the lead brand will be Canada, and British Columbia will become the sub-brand.

Strengthening the BC Brand

We have an opportunity to collectively strengthen the BC brand by working together. For a brand to function effectively, it must be clearly and consistently communicated across all global and local channels and touch points. A well-defined brand enables us to collectively strengthen our marketing impact by amplifying the voice of our brand through all stakeholders. The better aligned we are as a province across various regions, cities, communities and sectors, the more success we will have in capturing the attention of potential travellers. We encourage all tourism entities in BC to align and collaborate with us under the *Super, Natural British Columbia* brand by providing training tools and workshops.

7.3 VISITOR TRAVEL VALUES

The size of the global travel market has increased, but like every tourism organization, we simply don't have the resources to market to everyone. That's why we need to focus on our best potential customers. By developing a deep understanding of our target traveller through data analysis and segmentation tools, we can build marketing and communication activities that inspire travel to, and around BC, and encourage visitors and residents alike to recommend the province to friends and family. Tourism businesses can use this knowledge to enhance their products or develop new experiences for their best potential customers.

In addition to the standard variables of geographic markets and demographics, in order to inspire our target consumers we need to understand and inspire their motivations, dreams and passions. That's why we are constantly improving our insights into, and understanding of, traveller and consumer behaviour, attitudes and emotional connections with BC.

Using Destination Canada's Explorer Quotient (EQ) psychographic segmentation model, consumer insights and analytics, we have narrowed our focus to three of the twelve EQ traveller segments. Authentic Experiencers and Cultural Explorers are our primary focus; Free Spirits are a secondary focus. Currently, the majority of our visitors from outside British Columbia are 45 and over and we know that BC resonates strongly with the EQ "learners" (Cultural Explorers and Authentic Experiencers).

Traveller demographics and psychographics vary market to market; details are available in the Destination BC's Market Profiles on our corporate website.

We are:

- Focusing on the leisure travel segment, specifically affluent, frequent travellers.
- Focusing on the EQ "learners" (Cultural Explorers and Authentic Experiencers), with a secondary focus on Free Spirits.
- Focusing on content themes that cultivate long-term relationships for key trip-motivating travel experiences: Nature & Wilderness, Culture & Lifestyle, Cities on the Edge of Wilderness, Winter/Ski and Touring/Road Trips.
- Partnering with the Aboriginal Tourism Association of BC to focus on Aboriginal cultural tourism for the key North American and overseas markets that have high potential to experience our Aboriginal culture.
- Expanding passions-based marketing, working closely with sector organizations, to primarily North American markets. By promoting the opportunities to engage in specific travel-motivating activities our research has shown that we will create a higher potential for prompting active consideration for BC. In 2017 Destination BC will focus on the following passions: ski enthusiasts, mountain bikers/trail cyclists, fishers/anglers (fresh and saltwater), wine/culinary (breweries, wineries and dining) and golf. Learnings will be applied in 2018 and beyond.
- Building greater capacity for gathering and analyzing traveller insights through research and big data analytics across a host of consumer touch points, both along the path-to-purchase and while travellers are in-market.

We'll review our content themes and passions-based marketing targets annually, and adjust them to reflect overall market conditions.

7.4 KEY PARTNERS

BC's tourism industry is built on a foundation of established networks—national, provincial, regional and city/community DMOs as well as business and sector associations—that bring marketing and experience-development supports to the 19,000 tourism businesses in British Columbia. We know we need to strengthen these networks to ensure we can be stronger competitors, working even better together. We have a significant opportunity

to innovate in the way we pull our resources together to increase visitation and spend, and create a seamless consumer experience.

We envision partnerships where we can effect greater change together, through centralized systems with decentralized access, effective marketing processes and technologies, and joint approaches to marketing activities. Building scale by working together.

One source of our competitive advantage comes from ensuring that DMOs, sectors, and businesses, and people who are directly employed in tourism, have easy access to the information, tools, and connections they need to be leading edge, as consumer preferences and technologies evolve. In an industry made up of thousands of small- and medium-sized businesses and hundreds of communities, it can be difficult for any one business, or community, to harness the power of technology in a way that helps them compete on a global scale. We see there are great opportunities to utilize the power of data management platforms and other transformative technology to help BC's tourism industry be more formidable competitors, collectively.

Our global marketing team is developing programs to support BC tourism businesses and organizations in our provincial network to share our insights, share our content, and join forces to expand our marketing distribution. To extend our marketing power and our network reach, relevance and influence over consumers, we are actively working with both traditional and non-traditional tourism partners.

Traditional tourism partners include Destination Canada, other DMOs, the Aboriginal Tourism Association of BC, communities, regions, airlines and traditional travel trade. Non-traditional partners include new tourism sector partners and partners from outside the tourism sector with whom we share common audiences, such as BC Ferries, BCAA or retailers of outdoor recreation equipment, as examples.

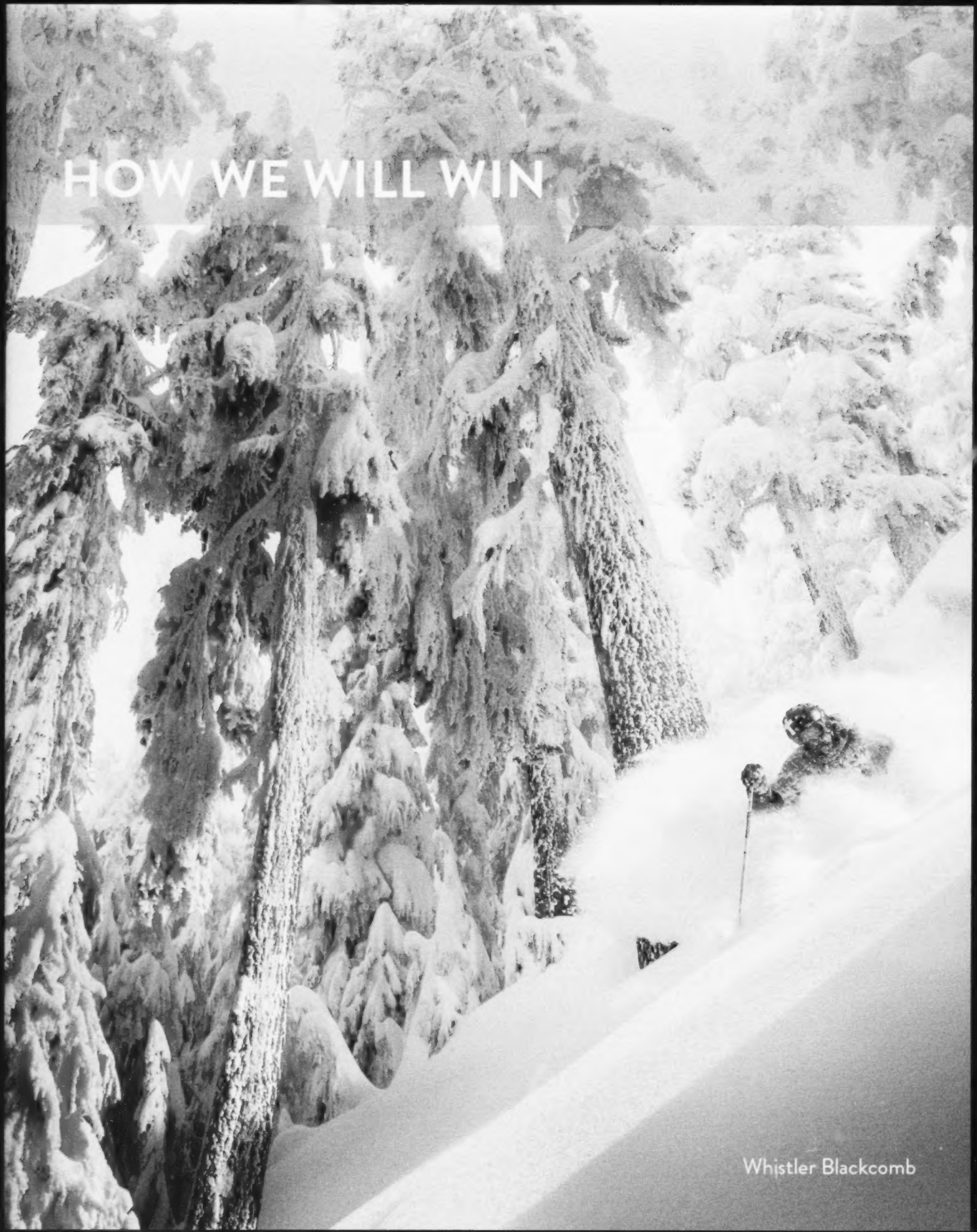
Through our destination and industry development programs, we support those businesses and networks that are aligned to our marketing and experience development strategies and can benefit from engagement in our programs, primarily focused on small- and medium-sized businesses.

We know we can better share the transformative power of BC experiences with the world by transforming ourselves, and our industry, into a more powerful network—one that is ready for the consumer and marketing forces that have already dramatically changed the landscape.

We are:

- Supporting Destination Canada's efforts in raising the awareness and demand for travel to Canada.
- Continuing to expand partnerships with traditional tourism partners such as airports, airlines and other destination marketing organizations across Canada.

- Continuing to build relationships with traditional travel trade in overseas markets, as well as strengthening global relationships with OTAs and other global organizations involved in the travel inspiration and planning/booking process.
- Continuing to develop new non-traditional partner agreements to enhance our marketing impact. These include global retailers, global clothing manufacturers, media organizations and more.
- Enhancing our relationships with powerful distribution platforms and publishers who are key gatekeepers with superior consumer reach and access to data and insights. These include Google, Facebook, TripAdvisor, and Amazon, among others.
- Working with key partners in BC to deliver our programs and ensure the industry is engaged and working collaboratively with us.
- Providing programs and resources to our partners to ensure the benefits of tourism growth are maximized throughout all parts of BC.
- Delivering value added industry training and learning programs such as Remarkable Experiences to small- and medium-sized tourism businesses that may not otherwise have access to such training.
- Providing strategic leadership and working in consultation with: Destination Canada; Aboriginal Tourism Association of Canada; Aboriginal Tourism Association of BC; provincial, regional, city and community DMOs; sector marketing organizations; businesses; and all levels of government.


HOW WE WILL WIN
Whistler Blackcomb

8 HOW WE WILL WIN

There are many activities we could be doing, and lots we'd like to do. However, a good strategic plan focuses on a few critical items that are most likely to lead to success.

In our case, we're focusing on three strategic imperatives that we believe will help us win in the competitive marketplace:

- Build a Powerful Marketing Network
- Foster Remarkable Experiences
- Engage our Collective People Power

8.1 BUILD A POWERFUL MARKETING NETWORK

The nature of tourism marketing and global competition has changed dramatically in the past few years. For destination marketers, it has become a digital battlefield where in many ways scale has become more effective than differentiation. In this landscape, large travel sites such as Google, Booking.com, and TripAdvisor that have superior reach, intelligence, and marketing infrastructure are becoming the primary authorities and sources of inspiration and information for travellers. Unlike DMOs, they have no geographic or brand allegiances.

For destination marketers to continue to differentiate their communities and provide value to their stakeholders, and for British Columbia's tourism industry to win a greater share of an expanding global market, BC's DMOs must re-visit fragmented marketing strategies and operating models, and seek new ways to create a sustainable competitive advantage. We need to be innovative in the areas of collaboration, consumer insights, content, distribution and digital sophistication.

We have the opportunity to create a new model, one that provides our whole tourism system with advanced marketing capabilities, making all of us stronger, more formidable competitors. We envision a model that shares the wealth of skills, tools and resources across our industry to create a powerful marketing network.

Together, we need to find new ways of working together to compete in this increasingly disruptive digital environment, which has impacted the way travellers find, explore, book and share travel experiences. Based on a foundation of our partnerships, BC must work towards a formalized collaboration model with the potential to lead to transformative change in how BC collectively connects with travellers.

"Build a Powerful Marketing Network" is based on three core strategies to attract potential consumers, support them through the travel planning process, and to help promote BC tourism businesses and entities:

- Captivate: create emotional urgency to visit BC
- Generate: generate leads for BC businesses, travel trade and online platforms
- Advocate: amplify traveller advocacy about BC

These core strategies are executed through partnerships that amplify our reach, utilizing brand-building content and experiences, and driven by data and insights.

For Captivate, we will drive visitation results by fostering an emotional connection between our target audience and BC, through alignment with stakeholders around the *Super, Natural British Columbia* brand, inspirational storytelling to passionate audiences and data-driven marketing.

For Generate, we will generate leads for BC tourism businesses, OTAs and travel trade overseas, and other online platforms such as TripAdvisor and Google. We will also support BC and global tourism businesses and entities that can convert a potential traveller, moving them along the path to purchase.

For Advocate, we will build on recommendations that fuel the algorithms of global publishers (e.g. Facebook, Google, Expedia, TripAdvisor) and promote direct word-of-mouth sharing via social media.

We are:

- Creating a content commonwealth – powered by content created by various sources including DMOs, residents, visitors to BC – and curating authentic stories about BC that people are compelled to share.
- Developing the foundational technologies and systems to support the collection and housing of content to enable our marketing partners.
- Building partnerships that amplify BC's marketing messages, including with DMOs, distribution partners and platforms, travel trade (traditional and OTA), travel media, and non-traditional corporate partners.
- Maximizing the impact of the *Super, Natural British Columbia* brand by encouraging all tourism entities in BC to adopt the brand essence and elements to maximize the impact globally.
- Leveraging actionable data and insights to serve up relevant content via automated advertising technology, along with a robust attribution model and a collective tagging framework to understand which content and channels best result in conversions through the path to purchase.
- Focusing on marketing innovation in how consumers engage with brands and content in order to continue to keep BC's image fresh and our marketing competitive.
- Enabling industry partners with social media tools and training to create a provincial network of online visitor services and social media marketing experts, creating remarkable on-the-ground experiences in BC, resulting in increased peer-to-peer recommendations.

Since 2014, DBC has increased its investment in cooperative marketing with communities and sectors from $2.2 million to $4.0 million. The Co-op Marketing Partnerships Program will continue to be a key initiative to amplify BC's marketing messages. It will enable groups that share common interests and marketing goals that align with provincial tourism priorities to leverage both private and public funds to achieve greater marketing impact and ROI. Program guidelines are available on our corporate website.

- Fostering ongoing and increasing awareness and adoption of **#exploreBC**, which reaches 50 million people every month, by residents, visitors and industry partners.

More About: Brand-building Content Development

British Columbia's worldwide reputation can be strengthened by collectively amplifying common themes around our brand. Content development is a coordinated and efficient approach for BC's tourism industry to create, curate, store and manage the best information to share with our audiences in a unified voice. By focusing on quality content, we can grow consumer interest and increase British Columbia's brand awareness.

Consumers are turning away from traditional advertising and are rapidly changing the way they find information and entertainment. They expect relevancy and personalization in their communication with brands which, when delivered well, leads to higher response and engagement rates. For marketers, advertising technology is making it easier to find audiences and serve up relevant content based on interests and stage of the purchase cycle. These changes make it possible to deliver the right content to the right person at the right time and place, to ensure perspective travellers move along the path to purchase and make a booking to come to BC.

Through quality content, we can tell our own stories directly to our audiences. But we can't simply say what we want consumers to hear: we need to understand consumer interests, show relevance, and focus on content that is entertaining, educational, or inspiring.

A "content commonwealth", or virtual library shared by all tourism organizations and businesses, will make us stronger together. We are working on the systems to better curate this content that is created by others. Tourism businesses can add their content into and "take out" and share with others in order to collectively create and then amplify our stories. Building scale by working together.

To meet this opportunity, Destination BC has created a new global content team with a focused editorial vision: *"Through inspirational storytelling, Destination British Columbia engages global explorers, connecting them to a place still wild."* We embrace the values of brand journalism by taking an editorial approach to brand awareness, and building story narratives that result in content that is more original and insightful, less predictable and cliché.

The team is responsible for an integrated editorial calendar that incorporates all markets and channels: blog, social media, consumer email, website updates, content partnerships and more. With industry input, it focuses on developing content against key themes and sub-topics that motivate our customers to travel to BC. Content is built through curating user-generated material from visitors, collaborating with industry and partners on content development and creating unique material that can be used by all tourism industry stakeholders.

The key themes are:

KEY THEMES	SUB-TOPICS
• Nature & Wilderness • Culture & Lifestyle • Cities on the Edge of Wilderness • Winter/Ski • Touring/Road Trips	• Brand Iconic Experiences (Rainforests, Cities in Wilderness, Skiing, Canadian Rockies, Ocean Coast) • Aboriginal Experiences • Accommodation • Attractions • Activities • Food & Drink • Adrenaline Adventure • Soft Adventure • Festivals / Events • Wildlife Viewing

More About: Actionable Consumer Insights (Data)

Digital transformation is one of the biggest game changers we face today. In response to this opportunity and challenge, we are focused on enhancing the data-driven marketing capabilities of our organization as well as our network partners. This includes a strong focus on developing actionable consumer insights—a shared pool of intelligence (data) allowing for better reach, targeting and understanding of travellers. This will provide us a better grasp of the effectiveness of our marketing activities, and create better, more relevant digital experiences for travellers through personalization.

To gather insights and understand collectively what content is resonating with travellers, we are developing a common tagging framework that will track what consumers do after they view our digital marketing initiatives. By tagging our content and websites, we are getting a better picture of the entire path to purchase. We will be working more closely with our tourism partners to use common tags and share the data.

8.2 FOSTER REMARKABLE EXPERIENCES

When visitors have remarkable experiences, they share their travel stories with friends, family, colleagues and thousands of other people they reach through their social networks. This is why a central part of our strategy focuses on enhancing the remarkable experiences we can offer our visitors.

As consumer preferences and interests change, we know that British Columbia needs to continue to evolve its offerings to remain fresh and innovative, offer quality and value for money against other destinations and meet the expectations of our priority and emerging markets.

We developed three strategic imperatives to bring together our industry, make our tourism network stronger, and ensure the future is more promising for the tourism sector overall:

- Mobilize: bring together and align industry's collective efforts
- Empower: enable BC's tourism network with new capabilities
- Transform: enhance experiences and destinations to increase competitiveness

For Mobilize, we will increase collaboration, coordination and alignment in marketing and destination development activities across BC's tourism industry. Mobilize speaks to the competitive advantage we can have by bringing together all key partners and industry towards a common vision, aligned goals and joint efforts. Building scale by working together.

For Empower, we will engage industry in our programs, tools and other opportunities that share the wealth of skills and resources across our industry to create a powerful marketing and experience development network.

For Transform, we will ensure BC has resilience in its long-term tourism appeal for future travel markets by evolving its offerings to remain fresh and innovative, offer quality and value for money against other destinations and meet the expectations of our priority and emerging markets.

We are:

- Leading destination development throughout the province through collaborative, integrated planning and coordination that leads to enhanced tourism economic growth across the province.
- Enabling tourism businesses to elevate their abilities by offering enhanced professional development, learning resources and tools, with a particular focus on experience design, digital readiness and the use of marketing technologies.
- Assisting tourism businesses to evolve their offerings and develop experiences that support the brand positioning, elevate their value proposition, and create memorable moments that garner recommendations, referrals and repeat visits.
- Ensuring robust data and intelligence to support informed business decision-making.
- Continuing to support innovative approaches to information delivery, incorporating forward-looking online, mobile and crowd-sourcing channels, alongside traditional Visitor Centres, as appropriate to each community.

More About: Destination Development Planning

British Columbia needs to remain relevant and compelling to travellers in an increasingly competitive global context. This is why we are working collaboratively with other parts of government, communities, businesses, DMOs, sectors and stakeholders (such as economic development officers), to address the need for tourism destination development

strategies. These strategies will inform private and public sector investment in new tourism experiences and infrastructure, and build long-term demand, enhancing BC as a destination of choice. In order to elevate tourism business operators' ability to compete as a premium destination, it is important we develop and enhance BC's current and future tourism assets strategically. Development plans and strategies are needed for all of BC's destinations, and we need to work collaboratively and build partnerships to find the best way to move these plans forward. It is essential we do this with a common vision in each planning area.

A strong focus on destination development will help make BC the most highly recommended destination in North America.

More About: Learning Strategy

The current pace of change in the tourism industry requires that tourism businesses stay up-to-date on visitor motivations, experience development, marketing best practices and social media platforms. Our new Industry Learning Strategy provides educational opportunities to strengthen operators' ability to compete and win in the tourism marketplace by focusing on the total visitor experience and marketing best practices. This strategy includes the integration of educational offerings across Destination BC into one department to better coordinate efforts, leverage specialized expertise, evaluate results and improve the overall experience and learning outcomes for industry.

Providing industry learning opportunities from one business unit will enable Destination BC to strategically:

- Determine resource investment.
- Ensure quality and consistency in content and delivery.
- Develop economies of scale through content development, administration and process.
- Better meet industry needs.
- More effectively measure and report on the results of learning investments.

Effective management of resources will enable us to offer new or enhanced learning opportunities for industry to stay on top of emerging trends and tourism influences. High demand topics such as brand, social media, content, value of tourism and digital marketing will be keys areas of focus that will be delivered through a variety of means including webinars, in-person workshops, blogs and case studies.

This approach will enable BC's tourism industry to gain a competitive advantage while ensuring that Destination BC strategically invests limited resources for maximum impact.

More About: Visitor Services

Today's visitor desires choice in how to access information, connect with friends and family, interact with online social networks and consult consumer reviews. At the same time, current research confirms that a significant number of visitors still place tremendous value on human connections, personalized information, interaction and storytelling that occur via visitor counsellors, hotel concierges and chats with locals at the corner cafe. Travellers want authenticity in their sources for inspiration and trusted advice on where to go and stay.

To remain competitive and maximize influence, visitor services must blend the best of what we currently offer with the new opportunities presented by digital access to information and services. We need to engage and inspire our visitors before they arrive, during their stay and even after they leave, so they will return and recommend BC to others.

Destinations need to consider a multi-channel approach to providing visitor services. The traditional bricks-and-mortar approach of welcoming visitors at visitor centres no longer has the broad economic impact that it once did.

8.3 ENGAGE OUR COLLECTIVE PEOPLE POWER

We know that success depends on empowering intelligent people to do great things. At Destination BC, we have diverse and dedicated people who are passionate about this industry and care about the success of individual businesses. To articulate their collective workplace vision, Destination BC staff crafted this team aspiration:

> *We are bold. We are visionaries. We ignite creative collaboration and inspire innovation. We welcome challenges and seize new opportunities. We bring out the best in one another and celebrate our successes, together. We are all empowered.*
>
> *We are Destination British Columbia.*

We strive to enhance the collective capabilities of the people in our industry and in our organization. Our refreshed corporate strategy requires us to lead our industry with a strong network-oriented culture that is:

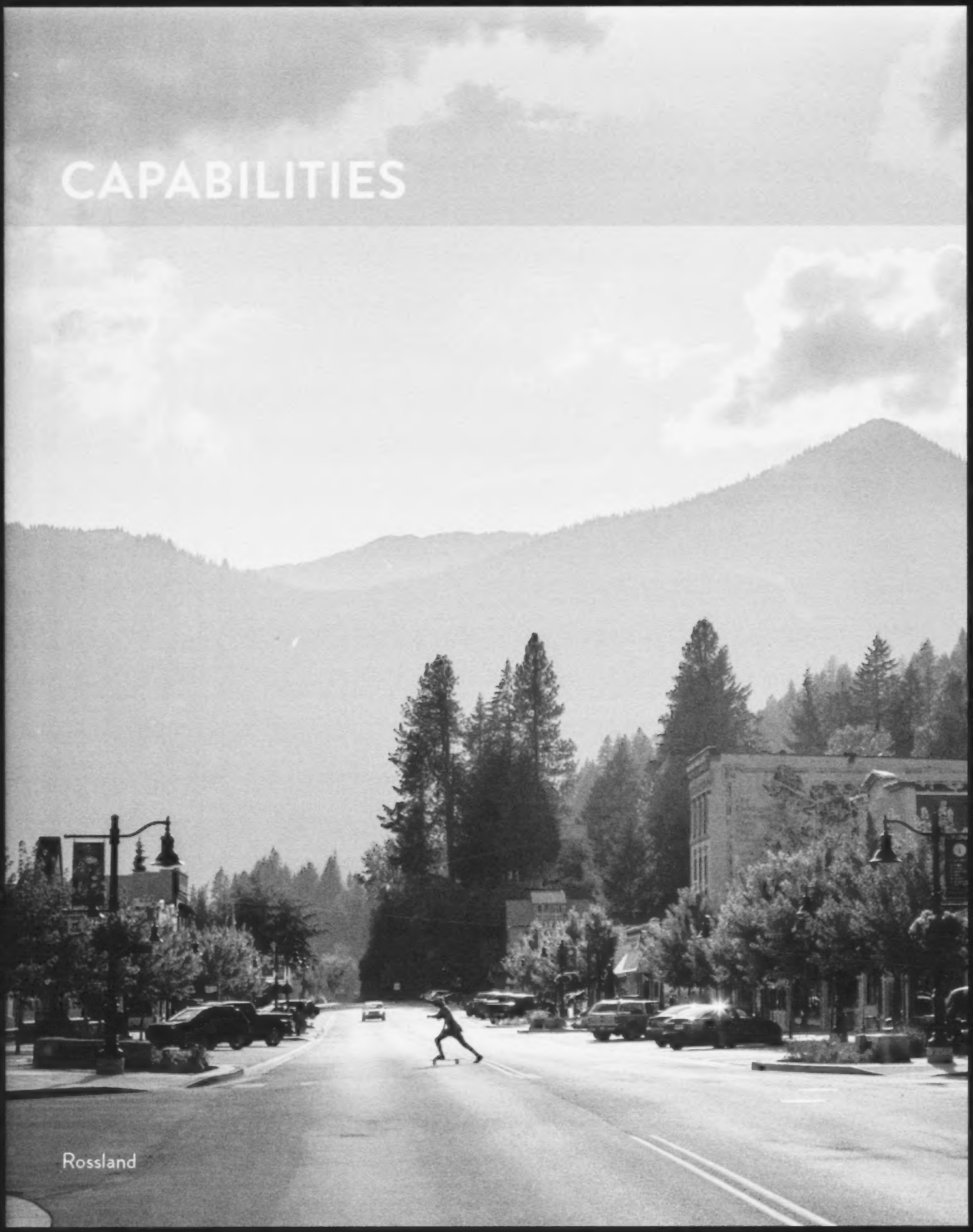
- Highly engaged
- Collaborative
- Insights-driven
- Results-focused
- Courageous

Our team will rally around our strategic direction, and will be supported by:

- Strong leadership
- Training and development opportunities
- Effective performance management
- A meaningful employee value proposition
- Targeted recruitment practices

We are inspired to do our best work for you, every day.

CAPABILITIES



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9 CAPABILITIES

Capabilities are the activities, skills and expertise that we must have and will enable us to deliver on our "where-will-we-focus" and "how-to-win" choices. Given the strategic choices described in the previous two sections, we must continue to develop our capabilities in brand leadership, partner engagement, and organizational agility, as well as our ability to develop and action key insights for best results. As an industry, we must be building scale by working together.

Brand Leadership

Brand Guidelines: We all play a role in cultivating and strengthening our destination brand for British Columbia. The BC destination brand guidelines are available on our corporate website.

- We must demonstrate clear and innovative brand strategies that globally capture the interest and emotional urgency to visit BC, in order to create better results for industry. We must become experts at managing brand advocacy since 90% of our visitors' travel decisions are influenced by word of mouth from our residents and visitors.
- We must cultivate expertise in content management. Content can be curated from others, created via collaboration with others, or created by ourselves. We, in turn, can amplify what is being created to reach consumers and pique their interest to visit BC.
- We need leading capabilities in leveraging digital distribution channels. Much of the path to purchase is captured online and the insights gathered through digital capabilities are vital to maximize the return on our investment in data-driven marketing.
- Our marketing must be innovative to garner attention and be impactful. Innovation can be found in both utilizing existing channels and content in new ways, and seeking out and supporting new technologies that will enable consumers.
- BC's destination brand must permeate all aspects of our visitor experience. Inspiration for a *Super, Natural British Columbia* vacation starts when someone first learns about BC and continues long after someone has returned home from their trip. Our brand is created and supported by all interactions our visitors and residents have when they are traveling in BC. We have an opportunity to positively influence their perceptions throughout the entire path to purchase and for future recommendations our visitors may make.
- We need the capability to build partnerships with powerful digital platforms that can provide us reach, influence and insight into our audience.

Partner Engagement

We need to collaborate ever more closely with our partners to:

- Pool resources and achieve greater scale for our industry, given the cost of leading edge marketing technologies.
- Share and leverage our joint expertise rather than investing independently in the same expertise and duplicating efforts.

- Ensure industry engagement in marketing through data collection and analysis, content creation and dissemination, and amplifying BC's marketing messages.
- Maximize the size and value of the audience we reach, and share and utilize the actionable insights we all develop.
- Share and leverage the marketing, experience development and visitor servicing innovation that is happening across British Columbia's tourism network.
- Create long-term destination development plans that we can jointly implement to ensure that BC becomes even stronger in the future.

Organizational Agility

To realize our full potential, our organizational assets must be leveraged to their fullest capacity and be able to respond quickly to changes in our operating environment and emerging opportunities. To achieve that:

- Our organization must be able to rapidly shift focus, people and resources from one activity to another as needed.
- We require a dynamic workforce that is agile, flexible and responsive to rapid, ever changing demands.
- We must continue to foster a culture that embraces continuous learning, innovation and experimentation.
- Our management of human resources must be flexible, supporting a "staff on demand" model when required and resilient enough to respond successfully to industry, technology and consumer demands.
- Our corporate processes must nimble, supporting an agile organization, while providing real-time performance reporting and accountability.
- We require technology systems architecture that is scalable and flexible to meet our ongoing needs and affords us with the opportunity to share intelligence with industry partners for mutual benefit and efficiency.

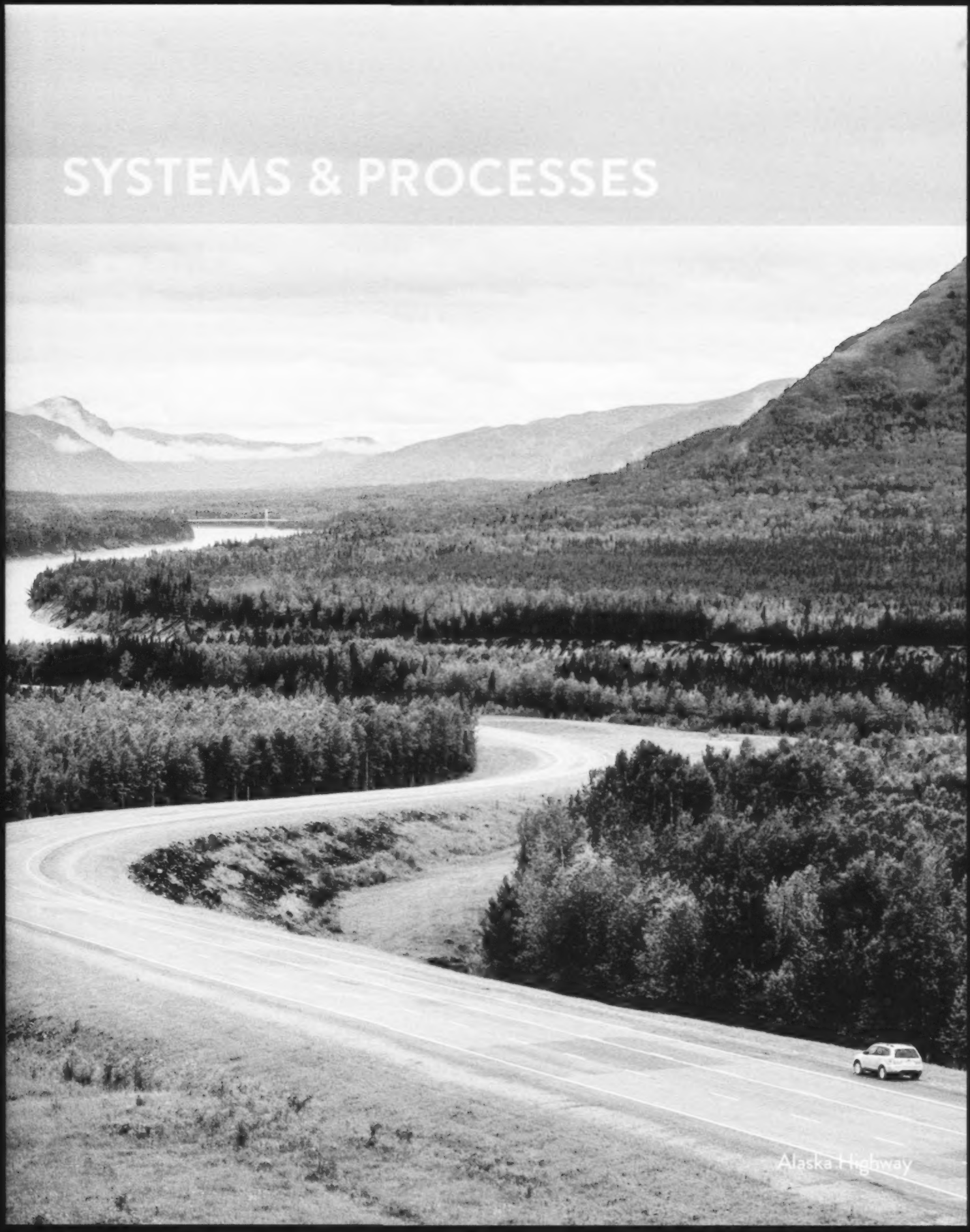
Actionable Insights

In order to have a robust understanding of our consumers, industry and evolving environment we must:

- Strengthen our ability to gather and action insights to understand and connect with consumers, to pursue new ways of doing business, and to better collaborate with industry partners to advance BC's tourism industry.
- Be at the forefront of leveraging data and creating and sharing insights to optimize our global marketing and destination development activities and those of our industry partners. We must be highly conversant with "big data" and how to apply it to consumer marketing and business decisions.

Our team must continue to be empowered and fully contribute to achieving our aspirations to share the transformative power of BC experiences with the world, and to grow sustainable social, cultural and economic benefits for all British Columbians.

SYSTEMS & PROCESSES



Alaska Highway

10 SYSTEMS & PROCESSES

Management systems are the processes, structures, business rules, and technologies that will build and strengthen the capabilities needed to deliver on our "where-will-we-focus" and "how-to-win" choices to and measure and reinforce our performance against those strategic choices.

The systems and processes we need to support this strategy are:

- People
    - A strong employee value proposition and leading human resource development practices to attract, motivate, develop and retain superior talent.
    - Systems and processes to support ongoing employee learning and development to ensure our people have the skills required for current and future business requirements.
    - Systems and metrics to assess our people power, optimize performance and inform skill development and acquisition.
    - Management processes that are flexible and agile, to allow, as needed, staff on demand, organizational agility, and external resources as required.
    - Communication and application of organizational values in everything that we do to ensure we are a high performing, values-driven organization.
    - Clear strategies, strong communication and devolved decision-making authority to empower people and encourage and foster innovation.

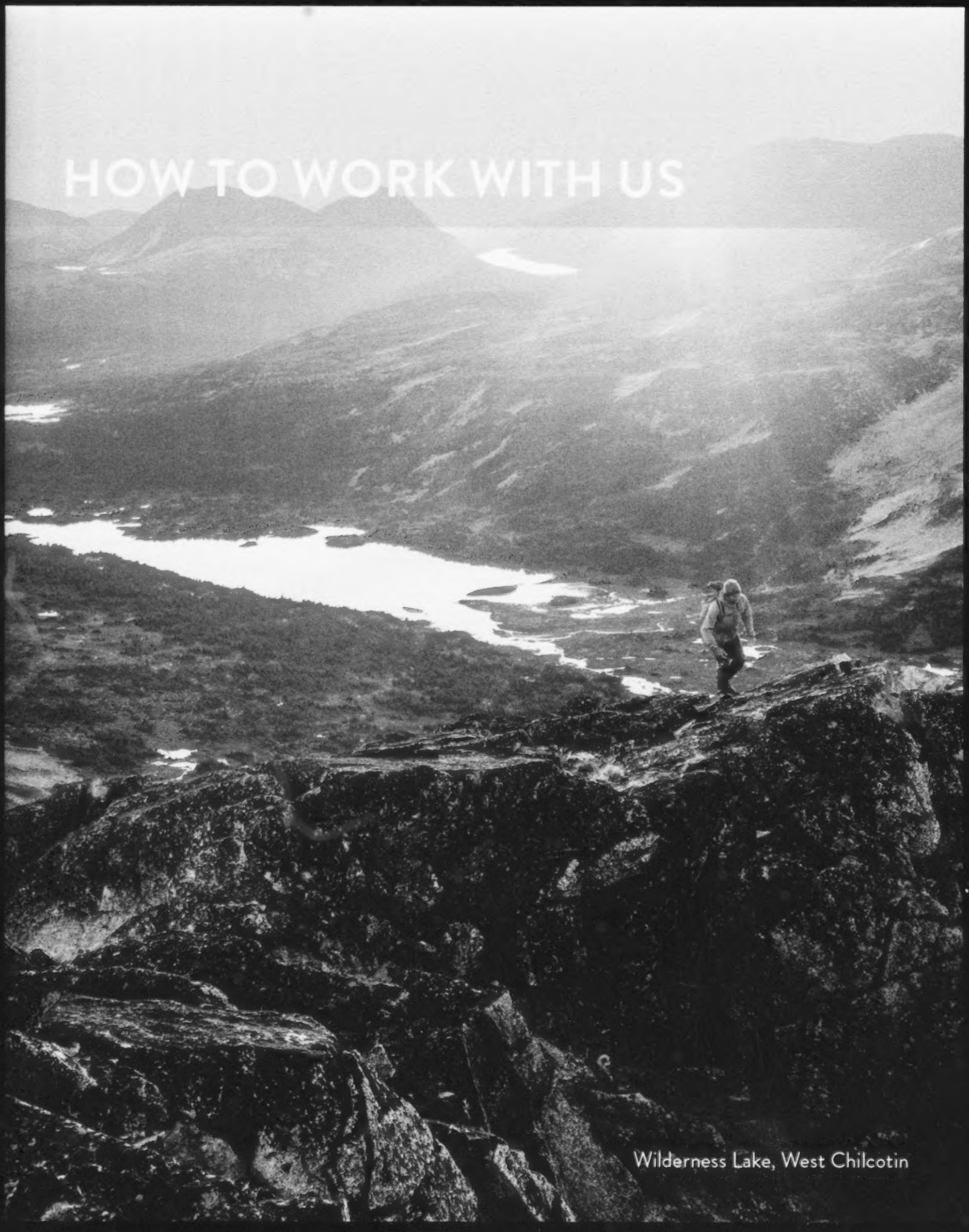
- Technology
    - Centralized systems, platforms and capabilities with decentralized interfaces.
        - This will enable the network of tourism partners to collectively apply shared systems, processes, expertise and other resources and will accelerate innovation, reduce costs and improve our ability to compete in global travel market.
    - Scalable and sharable systems and governance for content, data and distribution.
        - This will enable the centralized collection of consumer data leading to more useful consumer insights and improved advertising performance. In addition, a new content platform will provide a hub of BC branded content that industry at large can leverage.
    - Systems designed for flexibility in the future through plug-and-play applications, lease/buy options and open standards.
        - This philosophy will guide technology choices. It will provide the ability for Destination BC to scale more quickly by connecting to other technology services compared to the traditional approach of building and developing custom applications.

- Strong relationship management systems for Business to Consumer and Organization to Organization relationships.
  - This will give Destination BC the ability to deliver personalized content to consumers in a multi-device and multi-channel travel planning process and to provide more customized communications and services for our thousands of tourism industry partners.

- Partner Engagement
  - Strong relationship-building and management skills and tools are critical if we are going to create effective collaborative relationships. Working towards common goals and the use of common key performance indicators will help to drive greater industry alignment.
  - Program guidelines need to be clear, concise and user friendly.

- Corporate Processes:
  - To enhance strategic decision making, timely and relevant information is produced through agile corporate processes. From paying an invoice to sourcing a multi-million-dollar contract, processes will be continuously improved for greater efficiency and quality.
  - Performance management is achieved through translating the corporate strategy into clear objectives and meaningful metrics customized for the needs of corporate, divisional and business unit needs. Destination BC utilizes, and will continue to enhance, performance dashboards to enhance performance management at all levels of the organization.

HOW TO WORK WITH US



Wilderness Lake, West Chilcotin

11 HOW TO WORK WITH US

There are many active programs and initiatives that support this strategy. For them to be successful and for the BC tourism industry to reach its full potential we must all work together. The following resources provide more information on programs that might be useful for your organization and provide updates as programs evolve.

- Subscribe to our monthly newsletter for updates on marketing campaigns and tourism partnerships, media coverage, tourism facts and research, and upcoming events: www.destinationbc.ca/Subscribe.
- Follow us on Twitter @DestinationBC and LinkedIn.
- You can receive the detailed Global Marketing plan and Environmental Scan by request: email ContactTourism@destinationbc.ca.
- You can receive the detailed Destination & Industry Development plan by request: email ContactTourism@destinationbc.ca.
- You can review resources available from Destination BC (http://www.destinationbc.ca/Resources) and Destination BC's programs (http://www.destinationbc.ca/Programs) and then contact Destination BC using the ContactTourism@destinationbc.ca email address or area specific contact addresses on the website.
- Support global advocacy for British Columbia's truly remarkable experiences by promoting #**exploreBC** to all of your visitors and residents, and encourage them to post with this hashtag on social media.
- Contact your sector association or regional representative to engage in the content calendar process and to help build the Content Commonwealth library.
- Contact your regional representative or representative to get involved in the Remarkable Experiences program and/or destination development planning efforts in your area. You can attend the meetings, participate in the surveys and share your thoughts of how you would like your destination to evolve.